

# Banner Financial Aid Release Guide

*Release 8.9.1  
October 2010*

The logo features a black and white photograph of a student writing in a notebook on the left. To its right is a black rectangular box containing the word "SUNGARD" in white, bold, uppercase letters. Further right is a blue rectangular box containing the words "HIGHER EDUCATION" in white, uppercase letters. The entire logo is set against a background of three horizontal bars: a dark blue bar, a medium blue bar, and a grey bar.

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### Revision History Log

Publication Date	Summary
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October 2010	New version that supports Banner Financial Aid 8.9.1 software.
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# Banner Financial Aid 8.9.1 Release Guide

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# Introduction

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This guide documents the Banner® Financial Aid 8.9.1 release and includes enhancements, regulatory updates, Request for Process Enhancements (RPEs), and problem resolutions.

Beginning with the 2011-2012 aid year, SunGard Higher Education will no longer support the INAS integration to Banner for Federal Methodology (FM) - including Estimated Federal Methodology (EFM). In its place, the FM Need Analysis calculation, developed by SunGard Higher Education, will be used for Federal Methodology and Estimated Federal Methodology. The Institutional Methodology (IM) calculation will continue to be provided by the College Board through INAS.

These changes are being implemented through either of two Need Analysis options:

- Off-Premise - This Software-as-a-Service (SaaS) component will be managed by SunGard Higher Education. For this option, there are no specific hardware or software requirements, and you will no longer need to implement patches and upgrades specifically for the FM Need Analysis calculation.
- On-Premise - This option requires local management and is similar to your current implementation but requires additional setup (both hardware and software) for the hosted INAS component. For this option, additional server-class hardware and software is required.

## Problem Resolutions

Problem resolutions are summarized by object at the end of the release guide. For more information about a problem resolution, refer to the `finaid80901resolutions.txt` file that accompanies the Banner Financial Aid 8.9.1 release.

### Note

Any release hints, suggestions, or corrections to this release guide that arise, subsequent to the posting of this release, will be documented in the *Are there any helpful hints, suggestions and/or corrections to release documentation for Banner Financial Aid release 8.9.1?*, Solution/FAQ # 1-E8H6UB, and made available through the Customer Support Center ([https://connect.sungardhe.com/customer\\_support](https://connect.sungardhe.com/customer_support)). It is recommended that you refer to this document periodically under Solutions/FAQs (# 1-E8H6UB) as you use the new release functionality. ■

## Reporting Issues to ActionLine

Should it become necessary to report an issue to the ActionLine for this optional 8.9.1 release of the 2010-2011 FM Need Analysis as a SaaS component, select the following new product name:

- Financial Aid FM Need Analysis

Choose this new name from the Product drop-down list when submitting a Service Request via the Customer Support Center. Please follow this new process for reporting issues to ActionLine. These steps will ensure that your issue is routed and tracked appropriately.

# 1 CSS Profile - Functional



The functional and technical sections discuss the College Scholarship Service (CSS) which provides an early financial aid processing service known as the CSS/Financial Aid PROFILE. This information is used to assist schools with managing the financial aid process for students under an early decision program.

PROFILE data is used by the CSS Institutional Need Analysis System (INAS) software to calculate an Institutional Methodology (IM) Expected Family Contribution (EFC), which schools use to determine institutional financial aid eligibility. Clients that use IM may or may not subscribe to the CSS PROFILE service. However, all SunGard Higher Education clients can use IM, as it is built into the INAS software. SunGard Higher Education clients who do not receive PROFILE data from CSS must populate the PROFILE data in SunGard Higher Education, either manually or by copying data from the Federal Methodology (FM) record, to calculate an IM EFC.

## Note

Data from the FM record is not available until the Winter Release of the Banner Financial Aid System. As such, the “copy” from FM to IM function will not be activated for this release. ■

Beginning with the 2011-2012 aid year, SunGard Higher Education will no longer support the INAS integration to Banner for Federal Methodology (FM) - including Estimated Federal Methodology (EFM). In its place, the FM Need Analysis calculation, developed by SunGard Higher Education, will be used for Federal Methodology and Estimated Federal Methodology. The Institutional Methodology (IM) calculation will continue to be provided by the College Board through INAS. It is important to note that the CSS PROFILE XML schema delivers EFM data. This data is in no way reflective of Banner invoking the INAS EFM calculation; this is simply raw data that is delivered.

The 2011-2012 CSS PROFILE includes the following changes:

- All year values have been updated.
- Parents’ Non-Education VA Benefits (# 912) has been separated as its own untaxed income question.

## Note

This now allows a one-to-one comparison with the EDE column. ■

- The Advanced Placement (AP) question has been removed from the PROFILE.
- Impute Home Value Indicator has been added to the schema for Parent (# 1751) and Student (# 1796)

- SSN changed to numeric response:
  - Values now can be 000000000 – 999999999 or blank.
- Middle Initial will now only accept alpha characters.
- International Phone number will now support a “+” as the first character.
- The following tags have been removed from the schema:
  - IM Base Parent Contribution (complex element)
  - IM Base Student Contribution (complex element)
  - IM Estimated Student Contribution (complex element)
  - IM Summary (complex element)
  - Federal Eligibility (simple element)
  - Custodial Parent Options Adjustment (complex element)
  - IM Monthly Base Adjustment Values (complex element)
  - IM Monthly Options Adjustment Values (complex element)
- FNAR message list has been reduced.
- A new Assumption has been added:
  - Assumption used to determine the age of at least one of the student’s siblings.
- Registration only record will no longer be supported.
- FNAR is now in electronic format. Paper will no longer be supported.

 **Note**

To support IM and Early Decision for both PROFILE and non-PROFILE clients, all IM-related SunGard Higher Education forms and processes have been modified to incorporate CSS changes as well as making the normal new-year updates. This release describes all such changes for the 2011-2012 financial-aid processing year. ■

# New Forms

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The following forms have been added for this release.

## 2011-2012 Need Analysis Processing (RNAPR12)

RNAPR12 is a copy of the RNAPR11 form updated for Aid Year 2011-2012.

### Key Block

The hard-coded aid year in the upper right-hand corner has been changed to 1112.

### Navigation Frame and Options Menu

The following year-specific links have been updated for the 2011-2012 forms or processes:

- *Calculate Need* calls the RNEIN12 process for the IM calculation and the RNPFM12 process for the FM calculation.
- *Supplemental Need Analysis* calls the form RNASU12.
- *Need Analysis Results* calls the form RNARS12.
- *Applicant Override* calls the form RNAOV12.
- *Need Analysis (RNANA12)* has been added but de-activated with the link de-emphasized for this release.
- *Copy FM to IM* has been de-activated with the link de-emphasized.

### Note

This FM to IM copy feature will be activated with the Winter release. ■

## Biographic Data Tab

The **Application Type** field has been updated to reflect the de-support of the Registration Only record.

2011-2012 Need Analysis Processing RNAPR12 8.9.1 (FIN-CIT)

ID: 999111201 Conner A Kichline Number of FM Applications: 0 Number of IM Applications: 1  
 FM Source: Sequence: Current: EDE Correction: N IM Source: CSS IM Type: C

Biographic Data | Income and Benefits | Expenses | Assets | Expected Resources and Income | Prior Year Income and Overrides

**Application Type:** 1 Domestic Profile

FM Batch Lock  Lock Current  Keep FM Simulation  IM Batch Lock  Lock IM  Which Parent:  Keep IM Simulation

	FM Parent	FM Student	Comment	IM Parent	IM Student	Comment
Social Security Number:					999111201	
Number in Family:				4		
Number in College:				1		
Marital Status:	(None)	(None)		2=Married	1=Single	
State of Residence:				PA	PA	
Father or Stepfather's Date of Birth:				20-OCT-1952		
Mother or Stepmother's Date of Birth:				13-OCT-1954		
Lowest Income Filer:					N=No	

(Press NEXT RECORD to skip columns)

Updated Field:

Field	Description
Application Type	1=Domestic PROFILE, 4=International PROFILE.

## Income and Benefits Tab

2011-2012 Need Analysis Processing RNAPR12 8.9.1 (FIN-CIT)

ID: 999111201 Conner A Kichline Number of FM Applications: 0 Number of IM Applications: 1112  
 FM Source: Sequence: Current: EDE Correction: N IM Source: CSS IM Type: C

Biographic Data **Income and Benefits** Expenses Assets Expected Resources and Income Prior Year Income and Overrides

	FM Parent	FM Student	Comment	IM Parent	IM Student	Comment
Tax-Exempt Interest:				50		
Untaxed IRA Distributions:				0		
Untaxed Pensions:				0		
Military and Clergy Allowance:				0		
VA Non-Education Benefits:				1		
Other Untaxed Income:				0	0	
Other Non-Reported Money:						
Additional Child Tax Credit:				123		
Military Housing Allowance:				456		
Family Support Income:				789		
Other Untaxed Income for IM:				135		
Student's Veterans Benefits:					0	
Number of Months of Benefits:					00	
Veterans Benefits Received:					7=Other type of v...	
Means Test Benefits:				Y=Yes	N=No	
Dislocated Worker:	(None)	(None)		N=No	N=No	

(Press NEXT RECORD to skip columns)

New Field:

Field	Description
VA Non-Education Benefits	Amount of veteran's non-education benefits received by parent.

### Note

Because 2011-2012 FM data will not be available until January 2011 and the SunGard Higher Education forms to maintain FM data will not be delivered until the Winter release (January 2011), the FM side of RNAPR12 will be disabled. Users will not be able to maintain any FM data on this form at this time. The FM data management features will be re-enabled for the Winter release in January 2011.

## 2011-2012 Supplemental Need Analysis (RNASU12)

RNASU12 is a copy of the RNASU11 form that has been updated for Aid Year 2011-2012.

### Key Block

The hard-coded aid year in the upper right-hand corner has been changed to 1112.

## Navigation Frame and Options Menu

The following year-specific links are updated to the 2011-2012 forms or processes:

- *Calculate Need* calls the RNEIN12 process for the IM calculation and the RNPFM12 process for the FM calculation.
- *Process Need Analysis* calls the form RNAPR12.
- *Need Analysis Results* calls the form RNARS12.
- *Applicant Override* calls the form RNAOV12.
- *Need Analysis (RNANA12)* has been added but de-activated with the link de-emphasized for this release.

2011-2012 Supplemental Need Analysis RNASU12 8.9.1 (FIN-CIT) 1112

ID: 999111201 Conner A Kichline IM Source: CSS Type: C CUSTODIAL

**Application Type:** 1 Domestic Profile

Title: 1  
 Last Name: Kichline  
 First Name: Conner  
 Middle Initial: A  
 Citizenship Country: US

Marital Status: 1=Single  
 Citizenship Status: 1=U.S. citizen  
 Visa Classification: Other=Other  
 E-Mail: ckich@test1112.org  
 Social Security Number: 999111201  
 Date of Birth: 05-SEP-1992  
 Home Phone: ( 999 ) 9999999  
 International Home Phone:  
 School Assigned ID: 12345678901234567890  
 CSS ID: 4000078

Permanent Address  
 Address: 1650 Beech Blvd  
 City: Philadelphia  
 State: PA  
 ZIP Code: 15217  
 Postal Code:  
 Country: US  
 Foreign Address

Mailing Address  
 Address: Banner University Box 1  
 City: Malvern  
 State: PA  
 ZIP or Postal Code: 15217  
 Country Code: US

**Application Information**  
 Received by Processor: 19-AUG-2010  
 Processed by Processor: 15-SEP-2010  
 Last Calculation:  
 Created: 13-OCT-2010  
 By: MARKK  
 Updated: 13-OCT-2010  
 By: MARKK

The **Application Type** field has been updated to reflect the de-support of the Registration Only record.

Field	Description
Application Type	1=Domestic PROFILE, 4=International PROFILE.

The **Advanced Placement** indicator has been removed.

## Additional Supplemental Data window

Additional Supplemental Data RNASU12 8.9.1 (FIN-CIT)

Financial Aid Status:	1=1st time, entering	CSS College	5024	Housing	1=Campus housing
<b>Born before 01-JAN-1988 (Derived):</b>	2=No				(None)
Veteran of U.S. Armed Forces:	N=No				(None)
Graduate or Professional (Derived):	2=No				(None)
Married (Derived):	2=No				(None)
Orphan or Ward of Court:	N=No				(None)
Legal Dependents:	N=No				(None)
Homeless:	N=No				(None)
Expected Enrollment Status:	(None)				(None)
Year in College:	1=1st yr/no college				(None)
Fee Waiver:	N=No				(None)
Expected Tuition Benefit:	N=No				(None)
Expected Government Support:	N=No				(None)
Expected Foundation Support:	N=No				(None)

**Institutional Housing**  
2=Campus Housing

**Trust Information**  
Principal/Income Available: Y=Yes  
Established by: P=Parents

The **Born before 01-JAN-1987 (Derived)** field has been updated.

## 2011-2012 Applicant Override (RNAOV12)

The new 2011-2012 Applicant Override Form (RNAOV12) is a copy from the 2010-2011 Applicant Override Form (RNAOV11) and has been modified for 2011-2012.

### Key Block

The hard-coded aid year in the upper right-hand corner has been changed to 1112.

### Navigation Frame and Options Menu

The following year-specific links have been updated to the 2011-2012 forms or processes:

- *Process Need Analysis* calls the form RNAPR12.
- *Need Analysis Results* calls the form RNARS12.
- *Need Analysis (RNANA12)* added but de-activated with the link de-emphasized for this release.

## 2011-2012 Need Analysis Result (RNARS12)

The new 2011-2012 Need Analysis Result Form (RNARS12) is a copy from the 2010-2011 Need Analysis Result Form (RNARS11) and has been modified for 2011-2012.

## Key Block

The hard-coded aid year in the upper right-hand corner has been changed to 1112.

## Navigation Frame and Options Menu

The following year-specific links have been updated to the 2011-2012 forms or processes:

- *Supplemental Need Analysis* calls the form RNASU12
- *Process Need Analysis* calls the form RNAPR12.
- *Need Analysis (RNANA12)* has been added but de-activated with the link de-emphasized for this release.

## 2011-2012 Need Analysis Global Policy Options Rules (RNRGL12)

The new 2011-2012 Need Analysis Global Policy Options Rules Form (RNRGL12) is a copy from the 2010-2011 Need Analysis Global Policy Options Rules Form (RNRGL11) and has been modified for 2011-2012.

All references to prior years in the form have been removed.

- The RNRGLBL\_ID has been changed from V1011 to V1112 in UPDATE\_PART\_1 trigger.

## Navigation Frame and Options Menu

The Comparison Controls for the FAFSA and PROFILE Information window are as follows:

- The Comparison Controls for the FAFSA and PROFILE Information windows have been de-activated for this release.
- The *FAFSA* or *PROFILE Comparison Controls* on the Options menu have been de-activated and de-emphasized for this release.

# Changed Forms

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The following objects have been modified in the Banner Financial Aid 8.9.1 release:

## **ROQRPLS - used by RNAPR12**

All new fields have been added in order to prevent values from accidentally being set to NULL.

## **2010-2011 Need Analysis Supplemental Form (RNASU11)**

### **Parent and Family Supplemental Data window**

Because the RTVCCOE table will now use aid year, RNASU11 has been updated. Whenever the parent residence country code (RCRAPPI\_PAR\_CNTRY\_CODE\_RES) is updated, the International Citizens Country Coefficient (RCRIMP1\_COUNTRY\_COEFFICIENT) is also updated, based on country code and aid year. The POST-CHANGE trigger on item RCRAPPI\_PAR\_CNTRY\_CODE\_RES has been updated to include:

- AND RTVCCOE\_AIDY\_CODE = :KEYBLCK\_AIDY\_CODE

## **Calculated Need Analysis Detail Inquiry (RNINAIQ)**

No changes were made to the form for the CSS Profile updates. However, because certain tags were deleted from the PROFILE schema, users need to be aware when they do dataload that this data, which was displayed in the past, will not be displayed. The data will be displayed once the need analysis calculation is run. The following fields are impacted:

### **Main Window**

- IM SC:
- IM PC:
- IM EFC:
- IM Budget Duration:

## Need Analysis Detail Window

- IM Parent - Formula:
- IM Student - Formula:
- IM Parent - Total Income:
- IM Student - Total Income:
- IM Parent - Student Contribution:
- IM Student - Student Contribution:
- IM Parent - From Income:
- IM Student - From Income:
- IM Parent - From Assets:
- IM Student - From Assets:

The following are no longer available, even after need analysis is run:

- Percent of Income:
- Total PC:
- PC from Income:
- PC from Assets:

### Note

There may be other fields that were not displayed in the past. Only those fields impacted by the changes to the 2011-2012 CSS PROFILE schema are listed above. ■

## 2011-2012 Need Analysis Result (RNARS12)

No changes were made to the form for the CSS Profile updates. However, because certain tags were deleted from the PROFILE schema, users need to be aware when they do dataload that this data, which was displayed in the past, will not be displayed. The data will be displayed once the need analysis calculation is run. The following fields are impacted:

### Main Window

- IM SC:
- IM PC:
- IM EFC:

### Note

There may be other fields that were not displayed in the past. Only those fields impacted by the changes to the 2011-2012 CSS PROFILE schema are listed above.

## Country Coefficient Validation (RTVCCOE)

A key block has been added to the form allowing you to specify an Aid Year.

Field	Description
Aid Year	Aid Year; press LIST for valid codes.

## Changed Menus

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The IM INAS has been released in conjunction with Early Decision. The following menu updates relating to IM Need Analysis have been made:

### 2011-2012 Applicant Processing – \*RESAPPL12

The following entries have been added to the \*RESAPPL12 menu:

Applicant Status	ROASTAT
Financial Aid Record Maintenance	ROARMAN
2011-2012 Need Analysis Processing	RNAPR12
NSLDS Transfer Monitoring Application	RNATMNT
2011-2012 Need Analysis Result	RNARS12
Applicant Requirements	RRAAREQ
Applicant Budget	RBAABUD
Award Maintenance	RPAAWRD
Applicant User Defined Data	ROAUSDF
Financial Aid Enrollment	ROAENRL
Applicant High School Data	ROAHSDT
Student System Shared Data	*RESSHARE

### Applicant Processing – \*RESAPPL

\*RESAPPL12 has been added to the \*RESAPPL menu as the first entry:

2011 - 2012 Applicant Processing	*RESAPPL12
2010 - 2011 Applicant Processing	*RESAPPL11
2009 - 2010 Applicant Processing	*RESAPPL10
2008 - 2009 Applicant Processing	*RESAPPL09

2007 - 2008 Applicant Processing	*RESAPPL08
2006 - 2007 Applicant Processing	*RESAPPL07
2005 - 2006 Applicant Processing	*RESAPPL06

## 2011-2012 Need Analysis Menu – \*RESNEED12

The following entries have been added to the \*RESNEED12 menu:

2011-2012 Need Analysis Processing	RNAPR12
2011-2012 Supplemental Need Analysis	RNASU12
Country Coefficient Validation	RTVCCOE
2011-2012 Need Analysis Result	RNARS12
2011-2012 Applicant Override	RNAOV12
Applicant Need Analysis Application Inquiry	RNIAPPL
Applicant Student Loan Data Inquiry	RNINSLD
Calculated Need Analysis Detail Inquiry	RNINAIQ
2011-2012 Need Analysis Global Policy Options Rules	RNRGL12
Applicant Status	ROASTAT
Applicant Pell Grant	ROAPELL
Applicant Purge	RNAPURG
NSLDS Transfer Monitoring Application	RNATMNT

## Need Analysis – \*RESNEED

\*RESNEED12 has been added to the \*RESNEED menu as the first entry:

2011 – 2012 Need Analysis	*RESNEED12
2010 – 2011 Need Analysis	*RESNEED11
2009 – 2010 Need Analysis	*RESNEED10
2008 – 2009 Need Analysis	*RESNEED09
2007 – 2008 Need Analysis	*RESNEED08
2006 – 2007 Need Analysis	*RESNEED07
2005 – 2006 Need Analysis	*RESNEED06

## New Reports and Processes

### 2011-2012 FA CSS Data Load Part 1 (RCPCT12)

The new 2011-2012 FA CSS Data Load Part 1 (RCPCT12) process is a copy of the 2010-2011 FA CSS Data Load Part 1 (RCPCT11) process, updated for Aid Year 2011-2012.

 **Note**

SunGard Higher Education strongly recommends the use of Generated IDs because of the possibility of CSS data records not containing SSNs. If you choose to use SSNs for RCPCT12 and RCPMTCH, the students will be generated with an ID of "0" and marked as "New" or "Hold". If marked as "New", these students appear on the errs.lis output file of RCRT12 and go into suspense on RCRSUSP where you have the opportunity to create an ID for these students. ■

 **Note**

RCPCT12 has been added to the GORFEOB form, excluding the process from VBS FGAC. Also, RCPCT12 has been added to the RUASENV.COM script for VMS in 8.9.1 (required for every new version of RCPCTxx). ■

## GJAJOBS Process Maintenance

Process Name:	RCPCT12
Process Title:	2011-2012 FA CSS Dataload Pt 1
System:	R
Process Description:	Load 2011-2012 PROFILE records from CSS data into temporary tables.
Process Type:	Procedure
Lines per page:	55

## GJAPDEF Parameter Definitions

Parameter 01	
Description:	Aid Year Code for 2011-2012
List:	ROIADY
Type:	Character
Required:	Yes
Single:	Yes
Length:	4
Validation:	ROBINST_EQUAL_AIDY_ACTIVE
Default:	1112
Help:	This must be the aid year code for the 2011-2012 school year.

### Note

Job parameters 2 – 8 remain unchanged for 11-12 aid year processing. ■

## GJAPVAL Parameter Value Validations

Number	Parameter	Value
01	Aid Year Code for 2011-2012	1112

 **Note**

Job parameters 2, 3, and 4 remain unchanged for 11-12 aid year processing. ■

## 2011-2012 FA Data Load Part 3 (RCRTP12)

 **Note**

RCRTP12 has been added to the GORFEOB form, excluding the process from VBS FGAC. ■

The new 2011-2012 FA Data Load Part 3 (RCRTP12) process is a copy of the 2010-2011 FA CSS Data Load Part 3 (RCRTP11) process, updated for Aid Year 2011-2012.

## GJAJOBS Process Maintenance

Process Name:	RCRTP12
Process Title:	2011-2012 FA CSS Dataload Pt 3
System:	R
Process Description:	Load 2011-2012 production tables from temporary tables.
Process Type:	Procedure
Lines per page:	55
Validation:	RCRTPXX_VALIDATION

## GJAPDEF Parameter Definitions

Parameter 01	
Description:	Aid Year Code for 2011-2012
List:	ROIADY
Type:	Character
Required:	Yes
Single:	Yes
Length:	4
Validation:	ROBINST_EQUAL_AIDY_ACTIVE
Default:	1112
Help:	This must be the aid year code for the 2011-2012 school year.

### Note

Job parameters 2 – 19 remain unchanged for 11-12 aid year processing. ■

## GJAPVAL Parameter Value Validations

Number	Parameter	Value
01	Aid Year Code for 2011-2012	1112

### Note

Job parameters 2, 3, 5 - 8, 12, 14, and 16 - 19 remain unchanged for 11-12 aid year processing. ■

## Data Load

The process has been modified to load the data from the new columns, as well as existing RCRTMPx columns into the appropriate SunGard Higher Education permanent tables and columns.

The following new CSS fields have been loaded into permanent tables as listed below:

Temporary Table Column Name	Permanent Table Column Name
RCRTMP1_PAR_VETS_NON_ED_BEN	RCRAPP1_PAR_VETS_NON_ED_BEN
RCRTMP5_PAR_IPT_HOME_VALUE_OPT	RCRIMP1_PAR_IPT_HOME_VALUE_OPT
RCRTMP5_IPT_HOME_VALUE_OPT	RCRIMP1_IPT_HOME_VALUE_OPT
RCRTMP3_ASSUMPTION_MSG_7	RCRAPP3_ASSUMPTION_MSG_7

 **Note**

Although changes have been made to the IM to FM process for the early decision release, the RCPIMFM process will not be applicable until the 2011-2012 Winter Update. ■

## Discrepancy Report

The new 2011-2012 CSS PROFILE field (RCRAPP1\_PAR\_VETS\_NON\_ED\_BEN) has been added to the discrepancy report.

 **Note**

Most International Profile files contain a Country code instead of a state code. If you are loading permanent or mailing addresses to SPRADDR for students, you need to update STVNATN with codes that are not currently represented. If a code does not exist on STVNATN, an error message appears in the `errs.log` file and you can review RNASU12 to determine whether the code that must be added (refer to the College Boards' file on their website for country code descriptions). ■

## Changed Reports and Processes

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### rcfmtoim.sql (Copy FM data to IM)

 **Note**

Although changes have been made for the Early Decision release, the FM to IM script should not be used until the 2011-2012 Winter Update since no FM data is currently available. ■

This script is used by clients to create new IM records (in mass) from the existing current FM data for students not yet having IM data for the aid year. It is mostly used by clients who do not load IM data using CSS Profile, but still wish to do IM Need Analysis processing.

Prior to 2011-2012, the RCRAPP1\_PAR\_VETS\_NON\_ED\_BEN column was part of the summation of columns that was passed to RCRAPP3\_PAR\_INC\_BENEFITS. This column has been removed from that summation and will be passed directly, as a separate field, from FM to IM.

## rcpimfm.pc (Copy IM data to FM)

### Note

Although changes have been made for the Early Decision release, the IM to FM process should not be used until the 2011-2012 Winter Update since no FM data is currently available. ■

This process has been updated to copy the new unique IM fields to the current FM record.

### Note

This process merges all unique IM fields from the IM record into the current FM record so they may be used in rules processing. Once an FM record is loaded into the system it automatically becomes the current record while the IM record becomes the non-current record. Rules look only at the current record when being applied to a population and therefore, if unique IM data is to be used in rules this data must be copied to the current FM record. The IM to FM copy is part of data load Step 3, however, this process may also be required if a manual FM or IM record is created, or the current record is changed and the user wants the unique IM fields copied to the current FM record. ■

All new unique fields have been added in the 2011-2012 CSS Profile Record:

- RCRIMP1\_PAR\_IPT\_HOME\_VALUE\_OPT
- RCRIMP1\_IPT\_HOME\_VALUE\_OPT



## 2 INAS - Functional



This section describes the functional updates for the 8.9.1 release.

### New Process

#### 2011-2012 Need Analysis Calculation Process (INAS) (RNEIN12)

The RNEIN12 process is intended for use during the “1112” aid year where the Aid Year Start year is “2011” (ROBINST\_AIDY\_START\_YEAR = “2011” and the Aid Year End year is 2012 - ROBINST\_AIDY\_END\_YEAR = “2012”). The following describes changes that have been applied to RNEIN12 for this release:

- All associated copybooks using the INAS IM programs from CSS to Banner have been converted.
- RNEIN12 record has been added into the FGAC Excluded Objects table (GOBFEOB) via the GORFEOB form.

#### GJAJOBs Process Maintenance

Process Name:	RNEIN12
Process Title:	2011–2012 Need Analysis Calculation Process
System:	R
Process Description:	Performs the need analysis process for a given aid year (where xx is the aid year).
Process Type:	Procedure
Lines per page:	55

## GJAPDEF Parameter Definitions

Parameter 01	
Description:	Aid Year Code for 2011-2012
List:	ROIADY
Type:	Character
Required:	Yes
Single:	Yes
Length:	4
Validation:	ROBINST_EQUAL_AIDY_ACTIVE
Default:	1112
Help:	This must be the aid year code for the 2011-2012 school year

### Note

Job parameters 2 – 8 remain unchanged for 11-12 aid year processing. ■

## GJAPVAL Parameter Value Validations

Number	Parameter	Value
01	Aid Year Code for 2011-2012	1112

### Note

Job parameters 2, 3, and 4 remain unchanged for 11-12 aid year processing. ■

## 3 EFM - Functional



The Early Decision release is used by SunGard Higher Education Banner® clients to process and package financial aid to students who apply for early admission using CSS Profile or through an institution's own institutional application data.

Starting with the 2011-2012 aid year the FM/EFM calculation will only be available in Banner Financial Aid through the FM Need Analysis calculation developed by SunGard Higher Education. The FM/EFM calculation provided within INAS from CSS will no longer be available.

### New Forms

The following forms have been added for this release.

#### 2011-2012 Applicant Override Form (RNAOV12)

The new 2011-2012 Applicant Override Form (RNAOV12) is a copy from the 2010-2011 Applicant Override Form (RNAOV11) and has been modified for the 2011-2012 aid year.

#### Calculate Need Option

The form has been updated so that when the option to **Calculate Need** is selected, the RNPFM12 process is run for FM if the **Need Analysis Calculation Option** (ROBINST\_FM\_IM\_FLG) = "F" or "B" on the ROAINST form.

The **Use Hosted FM Need Analysis Calculation Option** (ROBINST\_HOSTED\_FM\_IND) will no longer be considered when determining whether or not to run RNPFM12 as it is the only solution provided for Federal Methodology for the 2011-2012 aid year.

## Main Window

2011-2012 Applicant Override RNAOV12 8.9.1 (FIN-CIT) 1112

ID: 999111201 Conner A Kichline

**Need Analysis Application**

Current FM Record Source: CSS  
Sequence Number: 0  
Lock Current Record: N  
Verification Message:

New FM Record Source:   
Sequence Number:   
Lock IM Record: N

**Applicant Override**

	FM-Parent	FM-Student	IM-Parent	IM-Student
Budget Duration:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Dependency:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Calculate Parent Contribution for Independent Student:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Medical or Dental Expense:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Tuition Paid:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
US Tax Calculation Option:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other Income Allowance:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other Assets:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other Asset Allowance:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

The form's main window has been updated to remove the following fields that are not permitted as FM or EFM overrides:

- **Allow Parent in College (Parent)**
  - RNROVRD\_FM\_PAR\_NUM\_COL
- **US Tax Calculation Option (Parent and Student)**
  - RNROVRD\_PAR\_CALC\_US\_TAX\_FM
  - RNROVRD\_CALC\_US\_TAXFM
- **Medical or Dental Expense (Parent and Student)**
  - RNROVRD\_PAR\_MED\_DENT\_EXP\_FM
  - RNROVRD\_MED\_DENT\_EXP\_FM
- **Tuition Paid (Parent and Student)**
  - RNROVRD\_PAR\_TUIT\_EXP\_FM
  - RNROVRD\_TUIT\_EXP\_FM
- **Other Income Allowance (Parent and Student)**
  - RNROVRD\_PAR\_OTH\_INC\_ALLOW\_FM
  - RNROVRD\_OTH\_INC\_ALLOW\_FM
- **Other Assets (Parent and Student)**
  - RNROVRD\_PAR\_OTH\_ASSET\_FM
  - RNROVRD\_OTH\_ASSET\_FM

- **Other Asset Allowance** (Parent and Student)

- RNROVRD\_PAR\_ASSET\_ALLOW\_FM

- RNROVRD\_ASSET\_ALLOW\_FM

Additionally, the **Dependency** row has been moved to display above the **Calculate Parent Contribution for Independent Student** row.

## **2011-2012 Need Analysis Processing Form (RNAPR12)**

### **Calculate Need Option**

The form has been updated so that when the option to **Calculate Need** is selected, the RNPFM12 process is run for FM if the **Need Analysis Calculation Option** (ROBINST\_FM\_IM\_FLG) = “F” or “B” on the ROAINST form.

The **Use Hosted FM Need Analysis Calculation Option** (ROBINST\_HOSTED\_FM\_IND) will no longer be considered when determining whether or not to run RNPFM12 as it is the only solution provided for Federal Methodology for the 2011-2012 aid year.

## **2011-2012 Supplemental Need Analysis Form (RNASU12)**

### **Calculate Need Option**

The form has been updated so that when the option to **Calculate Need** is selected, the RNPFM12 process is run for FM if the **Need Analysis Calculation Option** (ROBINST\_FM\_IM\_FLG) = “F” or “B” on the ROAINST form.

The **Use Hosted FM Need Analysis Calculation Option** (ROBINST\_HOSTED\_FM\_IND) will no longer be considered when determining whether or not to run RNPFM12 as it is the only solution provided for Federal Methodology for the 2011-2012 aid year.

# 2011-2012 Need Analysis Global Policy Options Rules Form (RNRGL12)

## Main Window

	FM Parent	FM Student	IM Parent	IM Student
Compare Student Data:	N			
Compare Parent Data:	N			
Use Tolerance:	Y			
Print INAR:			N	
State for Residency:			[dropdown]	
<b>Common FM and IM Options</b>				
Budget Duration for Independent:		9		9.0
Budget Duration for Dependent:		9		9.0
US Tax Calculation Option:			1	1
Calculate PC for Independent:	N		N	N
Use Projected Year Income:			N	N

The form's main window has been updated to remove the following fields that are not permitted for FM or EFM overrides:

- **US Tax Calculation Option** (FM Parent and FM Student)
  - RNRGLBL\_P\_FM\_CALC\_TAX
  - RNRGLBL\_S\_FM\_CALC\_TAX

The **Use Projected Year Income** row (**IM Parent** and **IM Student** options only) from the **Common EFM and IM Options** block has been moved to the **Common FM and IM Options** block.

The remaining elements of the **Common EFM and IM Options** block have been removed as the EFM Parent and EFM Student Options are no longer valid within the new FM calculation.

# Changed Forms

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The following form changes are included to support this release.

## Calculated Need Analysis Detail Inquiry Form (RNINAIQ)

### Main Window

A set of new FM Assumption Codes are now returned when assumptions have been made within the EFM/FM calculation. The codes returned by the calculation continue to be displayed on RNINAIQ's main window, under **FM Assumptions** and are detailed below:

Code	Assumption
PM	Parent Married/Remarried
PU	Parent Unmarried
SM	Student Married/Remarried
SU	Student Unmarried
PH	Parent Number of Family Members
SH	Student Number of Family Members
PL	Parent Number in College
SL	Student Number in College
PT	Parent Tax Filing Status
ST	Student Tax Filing Status
PG	Parent AGI
SG	Student AGI
PX	Parent Taxes Paid
SX	Student Taxes Paid
FI	Father Income
MI	Mother Income
SI	Student Income
SS	Spouse Income
SP	Student Has Legal Dependents
SD	Student Does Not Have Legal Dependents
SY	Student Born Before Cutoff
SZ	Student Not Born Before Cutoff
MR	Student Married/Remarried
NM	Student Non-Married
HC	Have Children You Support
NC	Do Not Have Children You Support

Code	Assumption
PA	Parent Additional Financial Information
SA	Student Additional Financial Information
PR	Parent State of Residence
SR	Student State of Residence
SF	Student Tax Filer
SN	Student Non-Tax Filer
PF	Parent Tax Filer
PN	Parent Non-Tax Filer
PB	Parent Untaxed Income
SB	Student Untaxed Income

## Need Analysis Detail Window

RNINAIQ has been changed so that the following non-federal overrides from the FM and EFM columns for both Parent and Student are not displayed starting with the 2011-2012 aid year:

	FM Regular Parent	IM Parent	FM Regular Student	IM Student	FM Estimated Parent	FM Estimated Student
Other Allowance:		0		0		0
Total Allowance:		0		0	0	0
Calculated Available Income:				0	0	0
Available Income:		0		0	0	0
Cash, Savings and Checking:		0		0	0	0
IRA and Keogh:				0		
Home Equity:		0		0		
Other Real Estate/Investment:		0		0	0	0
Business and Farm Net Worth:		0		0	0	0
Assets in Sibling's Name:		53,000				
Trust Value:				0		
Other Assets:		0		0		
Net Worth:		0		0	0	0
Asset Protection Allowance:		0		0	0	0
Emergency Reserve Allowance:		0		0		
CESA Allowance:		0		0		
Low Income Allowance:		0		0		

- Other Allowance:
  - RCRAPP4\_C\_PAR\_1\_OTH\_ALLOW
  - RCRAPP4\_C\_1\_OTH\_ALLOW
  - R4\_C\_PAR\_1\_OTH\_ALLOW
  - R4\_C\_PAR\_1\_OTH\_ALLOW

- Other Assets:
  - RCRAPP4\_C\_PAR\_1\_OTH\_ASSET
  - RCRAPP4\_C\_1\_OTH\_ASSET
  - R4\_C\_PAR\_1\_OTH\_ASSET
  - R4\_C\_1\_OTH\_ASSET

## Applicant Immediate Process Form (ROAIMMP)

### Calculate Need Option

ROAIMMP has been changed so that starting with the 2011-2012 aid year, when the **Need Analysis Calculation Option** is selected, the appropriate RNPFMxx process is run for FM, if the **Need Analysis Calculation Option** (ROBINST\_FM\_IM\_FLG) = “F” or “B”.

As of the 2011-2012 aid year, the **Use Hosted FM Need Analysis Calculation Option** (ROBINST\_HOSTED\_FM\_IND) will no longer be considered when determining whether or not to run RNPFMxx.

## Institution Financial Aid Options Form (ROAINST)

### Options Tab

ROAINST has been changed so that the **Use Hosted FM Need Analysis Calculation** indicator (ROBINST\_HOSTED\_FM\_IND) will no longer be displayed starting with the 2011-2012 aid year.

The screenshot shows the 'Options' tab of the ROAINST form. The 'Aid Year' is set to 1112. The 'Current Period' is set to FALL 2011, 'Current Term Code' is 201210, and 'Default Aid Period' is FA/SPR. The 'Initial SAP Status' is set to X, 'Initial SAP Term Code' is blank, and 'Exception SAP Status' is set to X. The 'Budgeting Group', 'Packaging Group', and 'Tracking Group' are all set to DEFAULT. The 'Tracking Established Status' is set to E, 'Methodology' is set to F=Federal, and 'Need Analysis Calculation Option' is set to F=FM. On the right side, there are several unchecked checkboxes: International, Create Applicant Non Year User-Defined Data, Create Applicant User-Defined Data, Rescheduled Disbursement Date, and Allow Award Status Updates When Locked. Other fields include 'Primary Application Source' (EDE), 'Application Received Date' (C=Date Created), 'Source for Application Received Date', 'Application Requirement Code', and 'Message Expiration Days'.

# U.S. Specific Institution Financial Aid Options Form (ROAUSIO)

## Grant and EDE Options Tab

ROAUSIO has been changed so that the **Use EFC Proration** indicator (ROBINST\_HOSTED\_FM\_IND) is no longer displayed starting with the 2011-2012 aid year.

The screenshot shows the 'U.S. Specific Institution Financial Aid Options - ROAUSIO 8.9.1 (FIN-CIT)' window. The 'Aid Year' is set to 2011-2012. The 'Grant and EDE Options' tab is active, displaying the following settings:

- Grants:**
  - Prevent Automatic Pell Calculation
  - Pell Reduced Eligibility
  - Cash Monitoring or Reimbursement
  - Alternate Pell Schedules Used
  - Use Pell Less than Half Time Calculation
- Just In Time or Advance Pay for Pell:**
  - Indicator
  - Number of Days:
- Advance Pay for ACG and SMART:**
  - Indicator
  - Number of Days:
- EDE:**
  - Update Transaction Number, EFC, Auto Zero EFC:
  - SAR Requirement Code:
  - SAR Requirement Status:
  - EDE Correction Logging

# New Process

---

## 2011-2012 FM Need Analysis Process (RNPFM12)

The new RNPFM12 includes the following updates:

### Basic Aid Year Updates

The <AwardYear> tag has been updated so that it always indicates “12” for RNPFM12.

The process has been updated so that all results are flagged as “Estimated” until the “Official” FM calculation is delivered with the Banner Financial Aid Winter Release. This means that the following columns will always be set to “2”:

- RCRAPP2\_C\_1\_CTRB\_OFFL\_EST
- RCRAPP2\_C\_PAR\_1\_CTRB\_OFFL\_EST (Only updated for Dependent Students)
- RCRAPP4\_C\_INST\_1\_TFC\_OFFL\_EST
- RCRAPP2\_PELL\_PGI\_OFFL\_EST

The Income Protection Allowance for a Dependent Student (RCRAPP2\_C\_1\_MNT\_ALLOW) has been updated and reflects 5250 rather than 4500.

The calculation of a student’s age has been updated to use the age as of 12/31/2011.

The Auto Zero EFC income threshold has been updated to \$31,000. The following tables used within the calculations have been updated for the 2011-2012 aid year:

- Student and Parent Tax tables
- Independent Student and Parent Asset Protection Allowance tables
- Student and Parent Income Protection Allowance tables

The calculation of Business, Farm, Investments and Real Estate will be calculated as follows, when calculating EFM from an IM data record:

### Note

This data differs from information received in an FM record, as only one data element is received for FM with the net amount of each. Therefore, when calculating using IM data the calculations that follow are used. ■

## Business/Farm Net Worth

$$(BV - BD) + (FV - FD) = \text{Business/Farm Net Worth}$$

Variable	Description
BV	Business Value
BD	Business Debt
FV	Farm Value
FD	Farm Debt

## Investment/Real Estate Net Worth

$$(IV - ID) + (REV - RED) = \text{Investment/Real Estate Net Worth}$$

Variable	Description
IV	Investment Value
ID	Investment Debt
REV	Real Estate Value
RED	Real Estate Debt

## PC for Independent Students

### RPE 1-BACUEM

The process has been updated to calculate a parent contribution for an independent student if requested either in the global options on RNRGL12 or through the individual student override on RNAOV12. The following hierarchy will be used to determine if a PC calculation should be performed for a given student:

1. Determine the individual PC option in the **Calculate Parent Contribution for Independent Student** (RNROVRD\_CALC\_PC\_FM) field on RNAOV12:
  - If “Y”, go to step 3., below
  - If Null, go to step 2., below
  - If “N”, do not calculate PC for the Independent student.

2. Review the global PC option in the **Calculate PC for Independent** (RNRGLBL\_FM\_INDEP\_PC) field on RNRGL12:
  - If = “Y”, continue to step 3., below
  - If “N” or Null, do not calculate PC for the Independent student.
  
3. Is one of the following columns Not Null?
  - Parents’ AGI (RCRAPP1\_PAR\_US\_INC)
  - Father’s Income (RCRAPP1\_FATH\_INC\_FR\_WRK)
  - Mother’s Income (RCRAPP1\_MOTH\_INC\_FR\_WRK)
  - Parents’ Total Additional Financial Information – Sum of the following columns:
    - Education Tax Credits (RCRAPP3\_PAR\_EDUC\_CREDITS)
    - Child Support Paid (RCRAPP3\_PAR\_CHILD\_SUPP\_PAID)
    - Need Based Employment (RCRAPP3\_PAR\_NEED\_BASED\_EMPLOY)
    - Grant and Scholarship Aid (RCRAPP3\_PAR\_GRANT\_SCHOLAR\_AID)
    - Combat Pay (RCRAPP4\_PAR\_COMBAT\_PAY)
    - Co-op Earnings (RCRAPP3\_PAR\_CO\_OP\_EARNINGS)
  - Parents Total Untaxed Income – Sum of the following columns:
    - Tax-Deferred Pensions (RCRAPP3\_PAR\_TAX\_DEF\_PENSION)
    - IRA and Keogh Deductions (RCRAPP3\_PAR\_IRA\_KEOUGH)
    - Child Support Received (RCRAPP1\_PAR\_CHILD\_SUPP)
    - Tax-Exempt Interest (RCRAPP3\_PAR\_TE\_INT\_INC)
    - Untaxed IRA Distributions (RCRAPP1\_PAR\_IRA\_DISTRIBUTIONS)
    - Untaxed Pensions (RCRAPP1\_PAR\_UNTAX\_PENSIONS)
    - Military and Clergy Allowance (RCRAPP3\_PAR\_HOUSE\_FOOD\_OTH)
    - VA No-Education Benefits (RCRAPP1\_PAR\_VETS\_NON\_ED\_BEN)
    - Other Untaxed Income (RCRAPP1\_PAR\_OTH\_UNTAX\_INC)
  - If “Y”, continue to step 4., below.
  - If “N”, do not calculate PC for Independent student.

4. Are all of the following columns Not Null?
  - Parents' Marital Status (RCRAPP1\_PAR\_MRTL\_STATUS)
  - Parents' Number of Family Members (RCRAPP1\_PAR\_FAM\_MEMB)
  - Parents' Number in College (RCRAPP1\_PAR\_NO\_IN\_COLL)
  - If "Y", calculate PC for Independent student.
  - If "N", do not calculate PC for Independent student.

When the PC for an Independent student is calculated, a second set of data will be extracted for the student, as if the student were a Dependent. This will be extracted in addition to the initial data extract for the student as Independent.

The <RecordID> for the Dependent calculation will be set in such a manner that the RNPFM12 process will know that the calculation is to be strictly used to capture the PC information for the student. When the calculation data is returned, the Dependent calculation transaction will only update the PC FM columns, while the Independent data calculation will update the Student FM columns.

This will allow the Independent Student Contribution to be correctly calculated as an Independent student, but will also calculate the Parent Contribution for the student.

## Global Options

RNPFM12 has been updated to use the global option for budget duration.

Logic related to the <EFCDuration> tag has been updated to perform the following:

- The value in the Budget Duration (RNROVRD\_BUDG\_DUR\_FM) column will be used if Not Null.
- If Null and the student is Independent, the value in the Budget Duration for Independent (RNRGLBL\_FM\_IND\_DUR) column will be used.
- If Null and the student is Dependent, the value in the Budget Duration for Dependent (RNRGLBL\_FM\_DEP\_DUR) column will be used.

### Note

When an institution is running both FM and IM and the Need Analysis Calculation Option (ROBINST\_FM\_IM\_FLG) = B, RNPFM12 will automatically run RNEIN12 after it has completed. RNPFM12 will generate an output report at the time that is run and on the output information for IM, FM and EFM is displayed. Because RNEIN12 has not yet completed, updated IM data will not yet be available for RNPFM12 to include on the output report. Therefore, the INAR report generated by RNEIN12 should be used to view updated IM calculation data. ■

# Modified Process

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## FM Need Analysis Web Archive (RNPFMXX.war)

The RNPFMXX.war has been updated for the 2011-2012 aid year to allow the RNPFMxx process to behave as a servlet.

 **Note**

As each new aid year calculator is introduced, the new code will be rolled into this object. ■



# 4 Miscellaneous Enhancements - Functional



This section includes descriptions that address the following defect resolutions:

- New Aid Year Checklist (Defect 1-B8F5U8)
- Online FM Calculations using job submission (Defect 1-DZCAQ0)
- Financial Aid Registration Report (RORREGS) Update

## New Aid Year Checklist

### Defect 1-B8F5U8

This defect has been resolved in this release.

#### Reported

In the *2010-2011 New Aid Year Checklist* (Release 8.6, January 2010), the RTVINTL form was erroneously identified in the Financial Aid New Year Roll Process (ROPROLL), step 9 (page 8).

Release 8.6 (January 2010), also erroneously listed an obsolete form (RORDSUP, two places):

- Common Functions Module (\*RESCOMN) section (page 9)
- Schedule B — Delivered System Required Data (page 31)

#### Corrective Action

References to both RORDSUP and RTVINTL have been removed in the updated version of the *2011-2012 New Aid Year Checklist* (Release 8.9.1, October 2010).

# Online FM Calculations using job submission

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## Defect 1-DZCAQ0

This defect has been resolved and addresses data entered on the Project Based Parameter Setup Form (RORPARM).

### Reported

In Banner Financial Aid Release Guide 8.8.1 (September 2010), a process that describes Online FM Calculations using job submission to update INB to use job submission to process online (Off-Premise) FM Calculations. Step 2. of the process (bottom of page 40) suggests:

- “For parameter USE\_JOBSUB, change the default value from “Y” to “N”.”

### Corrective Action

This step now reflects:

- “For parameter USE\_JOBSUB, change the default value from “N” to “Y”.”

### Additional Information

Refer to Release 8.9.1, *Appendix A, Additional Technical Details, Online FM Calculations using job submission*, in this Release Guide (page 81), for additional details.

# Financial Aid Registration Report (RORREGS) Update

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The Financial Aid Registration Report, RORREGS, has been updated to allow reporting registration for a Period. When reporting registration for a Period, all of the terms which are included in the definition of a Period on RORPRDS will be included.

For example, Period FALL/WINTER 2010, consisting of two terms, 201110 and 201115, will report the student's registration information for both terms and report the combined hours. When selecting to run RORREGS using a Period, you cannot designate to report only part-of-term and/or open learning courses; designating to report only part-of-term and/or open learning courses is only available when selecting to report registration information by term.

You have the option to run RORREGS for either a term or a Period.

## Parameter Changes

Aid Year (Parameter 01) and Term Code (Parameter 02) have been changed to optional.

Parameter 10, Period has been added to include the following:

Parameter 10	
Description:	Period
List:	ROIPRDS
Type:	Character
Required:	No
Single:	Yes
Length:	15
Validation:	ROBPRDS_EQUAL
Help:	Period



# 5 CSS Profile - Technical



This chapter describes the technical changes that support the CSS Profile processing.

## Changed Tables

### Additional CSS Profile Data Table (RCRIMP1)

The following columns have been added to the table:

Column Name	NULL	Type	Comment on Column
RCRIMP1_PAR_IPT_HOME_VALUE_OPT	<i>Yes</i>	VARCHAR2(1)	IMPUTE PARENTS' HOME VALUE: Option to impute parents' home value.
RCRIMP1_IPT_HOME_VALUE_OPT	<i>Yes</i>	VARCHAR2(1)	IMPUTE STUDENT'S HOME VALUE: Option to impute student's home value.

### Additional CSS Profile Data Table (RCRTMP5)

The following columns have been added to the table:

Column Name	NULL	Type	Comment on Column
RCRTMP5_PAR_IPT_HOME_VALUE_OPT	<i>Yes</i>	VARCHAR2(1)	IMPUTE PARENTS' HOME VALUE: Option to impute parents' home value.
RCRTMP5_IPT_HOME_VALUE_OPT	<i>Yes</i>	VARCHAR2(1)	IMPUTE STUDENT'S HOME VALUE: Option to impute student's home value.

## Country Coefficient Validation Table (RTVCCOE)

The following columns have been added to the table:

Column Name	NULL	Type	Comment on Column
RTVCCOE_AIDY_CODE	No	VARCHAR2(4)	AID YEAR CODE: The aid year to be associated with information in this record.

The current primary key index RTVCCOE has been dropped.

A new primary key, PK\_RTVCCOE, has been created on RTVCCOE (RTVCCOE\_AIDY\_CODE and RTVCCOE\_CODE).

Because the rows in the table currently don't have an aid year column, the RTVCCOE\_AIDY\_CODE has been added (initially, as a nullable column). After creating the aid year column, the `rtvccoeu_071802.sql` script must be run to update RTVCCOE\_AIDY\_CODE to "1011" for all rows and then the RTVCCOE\_AIDY\_CODE will be set to not nullable.

### Note

The `rtvccoeu_071802.sql` script is hardcoded to use "1011". If the user is not using standard aid year naming conventions, they must update the script using their standard. ■

## New Package

### RCKPI12 Package

The new RCKPI12 Package has been created for aid year 1112 to act as an interface between the RCPCT12 Java process and the database. This new package contains PL/SQL procedures which will receive the parsed XML data from Java and then call the new temp table APIs to insert the data into the temp tables. The new RCKPI12 Package addresses all changes in the XML document and the Java process.

## Modified Packages

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### DML\_RCRTMP5 Package

The following columns have been added for this release:

- RCRTMP5\_PAR\_IPT\_HOME\_VALUE\_OPT
- RCRTMP5\_IPT\_HOME\_VALUE\_OPT

### RB\_TEMP\_CSS\_DATA Package

The following columns have been added for this release:

- RCRTMP5\_PAR\_IPT\_HOME\_VALUE\_OPT
- RCRTMP5\_IPT\_HOME\_VALUE\_OPT

## Modified Database Triggers

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### RT\_RCRAPP1\_LOG\_INSUPDDL (rctapp19.sql)

In an earlier release, certain columns were added to the database for the 10-11 aid year but were not added to the logging triggers. This version adds the following columns to the logging triggers:

- RCRAPP1\_PAR\_CNTRY\_CODE\_RES
- RCRAPP1\_MAIL\_ADDR
- RCRAPP1\_MAIL\_CITY
- RCRAPP1\_MAIL\_STAT\_CODE
- RCRAPP1\_MAIL\_POSTAL\_CDE
- RCRAPP1\_INTL\_PHONE\_NO
- RCRAPP1\_MAIL\_COUNTRY\_CDE

### RT\_RCRIMP1\_LOG\_INSUPDDL (rctimp19.sql)

The following columns have been added for this release:

- RCRIMP1\_PAR\_IPT\_HOME\_VALUE\_OPT
- RCRIMP1\_IPT\_HOME\_VALUE\_OPT

In an earlier release, certain columns were added to the database for the 10-11 aid year but were not added to the logging triggers. This version adds the following columns to the logging triggers:

- RCRIMP1\_SCHOOL\_ASSIGNED\_ID
- RCRIMP1\_EXP\_TUIT\_BENEFIT\_IND
- RCRIMP1\_EXP\_GOV\_SUPP\_IND
- RCRIMP1\_EXP\_FOUND\_SUPP\_IND
- RCRIMP1\_PAR\_ADDL\_CHILD\_TX\_CRED
- RCRIMP1\_PAR\_MIL\_HOUS\_ALLOW
- RCRIMP1\_PAR\_IM\_OTH\_UNTAXED\_INC
- RCRIMP1\_PAR\_FAM\_SUPPORT\_INC
- RCRIMP1\_PAR\_OWED\_BY\_OTHERS
- RCRIMP1\_PAR\_INC\_FROM\_DEBTS
- RCRIMP1\_PAR\_OTHER\_ASSETS
- RCRIMP1\_PAR\_UTILITIES\_EXPENSE
- RCRIMP1\_PAR\_FOOD\_EXPENSE
- RCRIMP1\_PAR\_CLOTHING\_EXPENSE
- RCRIMP1\_PAR\_HOUSEHOLD\_EXPENSE
- RCRIMP1\_PAR\_DEBT\_EXPENSE
- RCRIMP1\_PAR\_ANNUAL\_DEBT\_PAY
- RCRIMP1\_PAR\_AUTO\_EXPENSE
- RCRIMP1\_PAR\_PROPERTY\_INSUR
- RCRIMP1\_PAR\_VACATION\_EXPENSE
- RCRIMP1\_PAR\_ENTERTAIN\_COSTS
- RCRIMP1\_PAR\_NBR\_EMPLOYED
- RCRIMP1\_PAR\_AMT\_PD\_HOME\_EMPLOY
- RCRIMP1\_PAR\_OTH\_EXPENSE
- RCRIMP1\_CURRENCY\_CDE
- RCRIMP1\_CURRENCY\_RATE
- RCRIMP1\_COUNTRY\_COEFFICIENT

- RCRIMP1\_CONV\_CURRENCY\_CDE
- RCRIMP1\_CONV\_CURRENCY\_RATE

## **RT\_RNRACMT\_LOG\_INSUPDDTL (rntacmt9.sql)**

In an earlier release, certain columns were added to the database for the 10-11 aid year but were not added to the logging triggers. This version adds the following columns to the logging triggers:

- RNRACMT\_ADDL\_CHILD\_TX\_CRED
- RNRACMT\_IM\_OTH\_UNTAXED\_INC
- RNRACMT\_MIL\_HOUS\_ALLOW
- RNRACMT\_FAM\_SUPPORT\_INC
- RNRACMT\_OWED\_BY\_OTHERS
- RNRACMT\_INC\_FROM\_DEBTS
- RNRACMT\_OTHER\_ASSETS
- RNRACMT\_UTILITIES\_EXPENSE
- RNRACMT\_FOOD\_EXPENSE
- RNRACMT\_CLOTHING\_EXPENSE
- RNRACMT\_HOUSEHOLD\_EXPENSE
- RNRACMT\_DEBT\_EXPENSE
- RNRACMT\_ANNUAL\_DEBT\_PAY
- RNRACMT\_AUTO\_EXPENSE
- RNRACMT\_PROPERTY\_INSUR
- RNRACMT\_VACATION\_EXPENSE
- RNRACMT\_ENTERTAIN\_COSTS
- RNRACMT\_NBR\_EMPLOYED
- RNRACMT\_AMT\_PD\_HOME\_EMPLOY
- RNRACMT\_OTH\_EXPENSE
- RNRACMT\_TYPE\_VET\_BENEFITS

## New Views

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The following new views will be used for the 2011-2012 aid year where the Aid Year Start year is 2011 (ROBINST\_AIDY\_START\_YEAR = 2011) and the Aid Year End year is 2012 (ROBINST\_AIDY\_END\_YEAR = 2012):

- 2011-2012 Admissions Applications View (ROVAD12)
- 2011-2012 Current Year Only Admissions Applications View (ROVAM12)
- 2011-2012 Admissions Application View – Including Students without Admissions Decisions (ROVA212)
- 2011-2012 Admissions Application View – Current Year Only Including Students without Admissions Decisions (ROVAY12)
- 2011-2012 Max Term SAP Status View (ROVSA12)
- 2011-2012 Aid Year Specific Student View (ROVST12)

### Note

You should review the above views to be sure they meet your aid year definition. Some views are hardcoded with the aid year (e.g. "1112" would signify the 2011-2012 Aid Year). Other views use the ROBINST\_AIDY\_START\_YEAR and ROBINST\_AIDY\_END\_YEAR instead of a hardcoded aid year (in this situation, may need to modify the view if you use multiple aid year codes with the same start and end years). ■

## Required Data

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### Country Coefficient Validation Table (RTVCCOE)

A new script (rtvccoei\_080901.sql) has been included in this release to insert new values into the Country Coefficient Validation Table (RTVCCOE). The script also updates the "1011" aid year to "1112".

The following values are new for the 11-12 aid year:

### Note

The British Virgin Islands country code has been changed from IO to VG for the 11-12 aid year. This script is required to insert the code. ■

<b>Country Code</b>	<b>Country Name</b>	<b>Country Coefficient</b>
CU	Cuba	0.2090517
IR	Iran, Islamic Republic of	0.2780172
PS	Palestinian Territory, Occupied*	0.0625000
SD	Sudan	0.0495690
VG	British Virgin Islands	0.8297414

The following country codes existed in the 10-11 aid year but the country coefficients have been changed for the 11-12 aid year:

 **Note**

Cells that contain bold faced country names indicate a name change from those found in the 10-11 aid year. ■

<b>Country Code</b>	<b>Country Name</b>	<b>Country Coefficient</b>
AD	Andorra	0.9676724
AE	United Arab Emirates	0.9051724
AF	Afghanistan	0.0172414
AG	Antigua and Barbuda	0.3900862
AI	Anguilla	0.2629310
AL	Albania	0.1357759
AM	Armenia	0.1271552
AN	Netherlands Antilles	0.3448276
AO	Angola	0.1918103
AR	Argentina	0.2974138
AS	American Samoa	0.1724138
AT	Austria	0.8491379
AU	Australia	0.8362069
AW	Aruba	0.4698276
AX	Aland islands	0.7521552

<b>Country Code</b>	<b>Country Name</b>	<b>Country Coefficient</b>
AZ	Azerbaijan	0.2241379
BA	Bosnia and Herzegovina	0.1357759
BB	Barbados	0.3987069
BD	Bangladesh	0.0344828
BE	Belgium	0.7887931
BF	Burkina Faso	0.0258621
BG	Bulgaria	0.2715517
BH	Bahrain	0.8275862
BI	Burundi	0.0064655
BJ	Benin	0.0323276
BL	Saint Barthelemy	0.7974138
BM	Bermuda	1.5064655
BN	<b>Brunei Darussalam</b>	1.0797414
BO	<b>Bolivia, Plurinational State of</b>	0.0991379
BR	Brazil	0.2198276
BS	<b>Bahamas</b>	0.6422414
BT	Bhutan	0.1163793
BW	Botswana	0.2823276
BY	Belarus	0.2500000
BZ	Belize	0.1745690
CA	Canada	0.8275862
CD	Congo, Democratic Republic of the	0.0064655
CF	Central African Republic	0.0150862
CG	Congo Republic of the	0.0883621

<b>Country Code</b>	<b>Country Name</b>	<b>Country Coefficient</b>
CH	Switzerland	0.8987069
CI	Cote d'Ivoire	0.0366379
CK	Cook Islands	0.1961207
CL	Chile	0.3168103
CM	Cameroon	0.0495690
CN	China	0.1422414
CO	Colombia	0.1982759
CR	Costa Rica	0.2349138
CV	Cape Verde	0.0732759
CY	Cyprus	0.4568966
CZ	Czech Republic	0.5409483
DE	Germany	0.7349138
DJ	Djibouti	0.0603448
DK	Denmark	0.7758621
DM	Dominica	0.2198276
DO	Dominican Republic	0.1788793
DZ	Algeria	0.1508621
EC	Ecuador	0.1594828
EE	Estonia	0.4030172
EG	Egypt	0.1293103
EH	Western Sahara	0.0538793
ER	Eritrea	0.0150862
ES	Spain	0.7262931
ET	Ethiopia	0.0193966

Country Code	Country Name	Country Coefficient
FI	Finland	0.7521552
FJ	Fiji	0.0840517
FK	<b>Falkland Islands (Malvinas)</b>	0.7629310
FM	Micronesia, Federated States of	0.0474138
FO	Faroe Islands	1.0387931
FR	France	0.7068966
GA	Gabon	0.2995690
GB	United Kingdom	0.7586207
GD	Grenada	0.2327586
GE	Georgia	0.0948276
GF	French Guiana	0.3730172
GG	Guernsey	0.9612069
GH	Ghana	0.0323276
GI	Gibraltar	0.8297414
GL	Greenland	0.7629310
GM	<b>Gambia</b>	0.0301724
GN	Guinea	0.0215517
GP	Guadeloupe	0.4693966
GQ	Equatorial Guinea	0.7887931
GR	Greece	0.6918103
GT	Guatemala	0.1120690
GU	Guam	0.3232759
GW	Guinea-Bissau	0.0129310
GY	Guyana	0.0818966

Country Code	Country Name	Country Coefficient
GZ	Gaza Strip	0.0625000
HK	Hong Kong	0.9202586
HN	Honduras	0.0905172
HR	Croatia	0.3793103
HT	Haiti	0.0280172
HU	Hungary	0.4008621
ID	Indonesia	0.0862069
IE	Ireland	0.9094828
IL	Israel	0.6120690
IM	Isle of Man	0.7543103
IN	India	0.0668103
IQ	Iraq	0.0775862
IS	Iceland	0.8534483
IT	Italy	0.6530172
JE	Jersey	1.2284483
JM	Jamaica	0.1767241
JO	Jordan	0.1142241
JP	Japan	0.7025862
KE	Kenya	0.0344828
KG	Kyrgyzstan	0.0452586
KH	Cambodia	0.0409483
KI	Kiribati	0.1314655
KM	Comoros	0.0215517
KP	<b>Korea, Democratic People's Republic of</b>	0.0409483

<b>Country Code</b>	<b>Country Name</b>	<b>Country Coefficient</b>
KR	<b>Korea, Republic of</b>	0.6034483
KS	Kosovo	0.0538793
KW	Kuwait	1.1659483
KY	Cayman islands	0.9439655
KZ	Kazakhstan	0.2543103
LA	<b>Lao People's Democratic Republic</b>	0.0452586
LB	Lebanon	0.2823276
LC	Saint Lucia	0.2349138
LI	Liechtenstein	2.6314655
LK	Sri Lanka	0.0969828
LR	Liberia	0.0107759
LS	Lesotho	0.0366379
LT	Lithuania	0.3318966
LU	Luxembourg	1.6810345
LV	Latvia	0.3125000
LY	<b>Libyan Arab Jamahiriya</b>	0.3275862
MA	Morocco	0.0991379
MC	Monaco	0.6465517
MD	<b>Moldova, Republic of</b>	0.0495690
ME	Montenegro	0.2112069
MF	Saint Martin	0.4439655
MG	Madagascar	0.0215517
MH	Marshall Islands	0.0538793

<b>Country Code</b>	<b>Country Name</b>	<b>Country Coefficient</b>
MK	<b>Macedonia, The Former Yugoslav Republic of</b>	0.1939655
ML	Mali	0.0258621
MM	<b>Myanmar</b>	0.0237069
MN	Mongolia	0.0689655
MO	<b>Macao</b>	0.7112069
MP	Northern Mariana Islands	0.2693966
MQ	Martinique	0.5197845
MR	Mauritania	0.0452586
MS	Montserrat	0.0732759
MT	Malta	0.5129310
MU	Mauritius	0.2672414
MV	Maldives	0.0905172
MW	Malawi	0.0193966
MX	Mexico	0.2909483
MY	Malaysia	0.3189655
MZ	Mozambique	0.0193966
NA	Namibia	0.1379310
NC	New Caledonia	0.3232759
NE	Niger	0.0150862
NG	Nigeria	0.0517241
NI	Nicaragua	0.0603448
NL	Netherlands	0.8448276
NO	Norway	1.2629310
NP	Nepal	0.0258621

<b>Country Code</b>	<b>Country Name</b>	<b>Country Coefficient</b>
NR	Nauru	0.1077586
NU	Niue	0.1250000
NZ	New Zealand	0.5883621
OM	Oman	0.5150862
PA	Panama	0.2564655
PE	Peru	0.1853448
PF	French Polynesia	0.3879310
PG	Papua New Guinea	0.0517241
PH	Philippines	0.0711207
PK	Pakistan	0.0560345
PL	Poland	0.3857759
PM	Saint Pierre and Miquelon	0.1508621
PR	Puerto Rico	0.3706897
PT	Portugal	0.4698276
PW	Palau	0.1745690
PY	Paraguay	0.0883621
QA	Qatar	2.6228448
RE	Reunion	0.5064871
RO	Romania	0.2478448
RS	Serbia	0.2241379
RU	<b>Russian Federation</b>	0.3254310
RW	Rwanda	0.0193966
SA	Saudi Arabia	0.4396552
SB	Solomon Islands	0.0560345

<b>Country Code</b>	<b>Country Name</b>	<b>Country Coefficient</b>
SC	Seychelles	0.4181034
SE	Sweden	0.7931034
SG	Singapore	1.0840517
SH	<b>Saint Helena, Ascension, and Tristan Da Cunha</b>	0.0538793
SI	Slovenia	0.6012931
SK	Slovakia	0.4568966
SL	Sierra Leone	0.0193966
SM	San Marino	0.9030172
SN	Senegal	0.0344828
SO	Somalia	0.0129310
SR	Suriname	0.1939655
ST	Sao Tome and Principe	0.0366379
SV	El Salvador	0.1530172
SY	<b>Syrian Arab Republic</b>	0.0991379
SZ	Swaziland	0.0948276
TC	Turks and Caicos Islands	0.2478448
TD	Chad	0.0344828
TG	Togo	0.0193966
TH	Thailand	0.1745690
TJ	Tajikistan	0.0387931
TK	Tokelau	0.0215517
TL	Timor-Leste	0.0517241
TM	Turkmenistan	0.1487069
TN	Tunisia	0.1724138

<b>Country Code</b>	<b>Country Name</b>	<b>Country Coefficient</b>
TO	Tonga	0.0991379
TR	Turkey	0.2413793
TT	Trinidad and Tobago	0.4978448
TV	Tuvalu	0.0344828
TW	<b>Taiwan, Province of China</b>	0.6422414
TZ	<b>Tanzania, United Republic of</b>	0.0301724
UA	Ukraine	0.1379310
UG	Uganda	0.0280172
US	United States	1.0000000
UY	Uruguay	0.2737069
UZ	Uzbekistan	0.0603448
VA	<b>Holy See (Vatican City State)</b>	0.6530172
VC	Saint Vincent and the Grenadines	0.3900862
VE	<b>Venezuela, Bolivarian Republic of</b>	0.2823276
VI	Virgin Islands, U.S.	0.3125000
VN	<b>Viet Nam</b>	0.0625000
VU	Vanuatu	0.1034483
WE	West Bank	0.0625000
WF	Wallis and Futuna	0.0818966
WS	Samoa	0.1163793
YE	Yemen	0.0538793
YT	Mayotte	0.1056034
ZA	South Africa	0.2176724

Country Code	Country Name	Country Coefficient
ZM	Zambia	0.0323276
ZW	Zimbabwe	0.0021552

## INAS Global Policy Options Table (RNRGLBL)

Two new scripts are delivered as part of this release

The `rinsgl12.sql` script has been created in the `finaid/plus` directory to allow users to reset the 11-12 global default values in the RNRGLBL table. The following changes have been incorporated for the 11-12 aid year:

- `rnrglbl_aidy_code = '1112'`
- `rnrglbl_part_one` positions 1 – 5 = 'V1112'
- `rnrglbl_part_two = Null`

### Note

The `rinsgl12.sql` script is located in the `finaid/plus` directory which allows you to re-run the script at any time should it become necessary to reset all options back to original values. ■

The `rnrglbli_071802.sql` script has been created in the DML directory to insert the 11-12 global default values into the RNRGLBL table. In addition to any year specific adjustments, the following changes have been made to the values in the insert statement:

- `rnrglbl_aidy_code = '1112'`
- `rnrglbl_part_one` positions 1 – 5 = 'V1112'
- `rnrglbl_part_two = Null`

## Pell Payment Schedule Table (RORPELL)

A new script, `rorpelli_071802.sql` inserts RORPELL records for 1112 aid year. Because the 2011-2012 maximum Pell Grant has not been determined and the 2011-2012 Pell Grant schedule has not yet been published, the values from the 1011 RORPELL table have been copied into the 1112 table and delivered with this release.

## Federal Rules Inquiry Table (RPRFEDR)

A new script, `rprfedri_071802.sql` inserts RPRFEDR records for 1112 aid year. At this time, the Annual Maximum for the Federal Pell Grant (Federal Fund ID of PELL) has not been finalized for the 2011-2012 aid year. The values from the 1011 RPRFEDR table have been copied into the 1112 table.

### Note

Because ACG and SMART will not be funded (as of July 1, 2011) they have been excluded from this copy process. ■

## Grant Calculation Process (RPRGRNT)

A new script, `rprgrnti_071802.sql` inserts RPRGRNT records for 1112 aid year. At this time, no changes have been identified to the maximum award amounts for TEACH. The values from the 1011 RPRGRNT table have been copied into the 1112 table.

### Note

Because ACG and SMART will not be funded (as of July 1, 2011) they have been excluded from this copy process. ■

## Data Log Rules (RORDATA)

### Delete 1112 records

A new script, `rordatad_080901.sql` deletes the new RORDATA values that have been added for 7.18.2 but will not be used in Banner 8.9.1 due to the logging changes. The script deletes all RORDATA rows where `RORDATA_AIDY_CODE = "1112"`, `RORDATA_SAR_NO` is NULL, `RORDATA_DL_IND` is NULL, and `RORDATA_EL_IND` is NULL.

## RORLOGC Logging Control Repeating Table

A new script, `rorlogci_080901.sql` adds entries to the Logging Control Repeating Table (RORLOGC) for the following new columns:

RORLOGC_ TABLE_NAME	RORLOGC_COLUMN_NAME	RORLOGC_COLUMN_DESC	RORLOGC_ LOG_IND
RCRIMP1	RCRIMP1_PAR_IPT_HOME_VALUE_OPT	Impute Parents' Home Value	N
RCRIMP1	RCRIMP1_IPT_HOME_VALUE_OPT	Impute Student's Home Value	N

# 6 INAS - Technical



This section describes the technical updates for the 8.9.1 release.

## Required Data

### INAS Global Policy Options Table (RNRGLBL)

The INAS Global Policy Options Table (RNRGLBL) is used to store the policy options maintained on the 2011-2012 INAS Global Policy Options Rules Form (RNRGL12), which is a year-specific form. The columns in this table are:

Name	Null	Type	Comment
RNRGLBL_AIDY_CODE	Not Null	VARCHAR2(4)	The aid year to which these global policy options apply.
RNRGLBL_ACTIVITY_DATE	Not Null	DATE	The date that this record was created or last updated.
RNRGLBL_USER_ID	Not Null	VARCHAR2(30)	The user ID who created or last updated this record.
RNRGLBL_PART_1		VARCHAR2(2000)	First 2000 bytes of the 4000-byte INAS GLOBAL record whose value determines the current policy options in effect.
RNRGLBL_PART_2		VARCHAR2(2000)	Second 2000 bytes of the 4000-byte INAS GLOBAL record whose value determines the current policy options in effect.

For INAS to produce complete and accurate calculations, Banner must pass a completely populated GLOBAL record to INAS. Therefore, the default values used for each option must be populated in the RNRGLBL table. The original CSS default settings, which users can review and change via the INAS Global Policy options Rules (RNRGL12) form, are contained in the IWKGLB12 copybook in the INAS2012.pco program.

The base table for RNRGL12 is the RNRGLBL table. In addition to the Aid Year Code, Activity Date, and User ID, this table has two columns of 2000 bytes each. RNRGL12 must be able to read from and write to a particular position in one of the two 2000-byte database columns. The table found in the next section (RINSG12.SQL) identifies all the items in the RNRGLBL\_PART\_1 column, their positions, and default values.

 **Note**

No additional columns were added to the INAS Global Policy Options Table (RNRGLBL) for 2011-2012. All changes are year specific updates. ■

## RINSG12.SQL

As part of the 2011–2012 CSS PROFILE Data Load Software Requirements Specification, a new script, RINSG12.SQL, has been included to insert the 2011-2012 global default values into the RNRGLBL table.

With the release of the 2011-2012 INAS, the year specific changes need to be completed. The table that follows identifies all the items in the RNRGLBL\_PART\_1 column, changes from 1011 as well as their positions, and default values.

 **Note**

SunGard Higher Education recommends this script not be run as part of the next mandatory release if data already exists in the user's database for 2011-2012. If it is re-run, it will overwrite user updates made prior to the new install. ■

 **Note**

The format for all data in the RNRGLBL table is VARCHAR2(x). Therefore, when moving data from the form to the database, numeric fields must be right justified and left padded with zeros. For example, a NUMBER(5) field with data of 123 must be saved to the database as “00123”. ■

 **Note**

All CSS options on RNRGL12 affect the RNRGLBL\_PART\_1 column, whereas the options affecting the RNRGLBL\_PART\_2 column deal with PROFILE/ISIR data comparison. The RNRGLBL\_PART\_2 options are not valid until ISIR data is loaded into the database, which will not occur until the 2011-2012 Winter release is provided, therefore RNRGLBL\_PART\_2 options are not included at this time. ■

The following changes were made to RNRGLBL\_PART\_1 for the 8.9.1 release:

<b>Item</b>	<b>Format</b>	<b>Pos.</b>	<b>Last Year (1011) Value</b>	<b>This Year (1112) Value</b>
RNRGLBL_AIDY_CODE (Not Null)	VARCHAR2(4)		1011	1112
RNRGLBL_ID	VARCHAR2(5)	1	V1011	V1112
RNRGLBL_S_EMPLMNT_MAX	NUMBER(5)	222	03970	04040
RNRGLBL_P_EMPLMNT_MAX	NUMBER(5)	230	03970	04040
RNRGLBL_U_YR1_PRIOR_ATTEND_1	NUMBER(4)	661	2350	2400
RNRGLBL_U_YR2_1	NUMBER(4)	671	2350	2400
RNRGLBL_U_YR3_1	NUMBER(4)	681	2350	2400
RNRGLBL_U_YR4_1	NUMBER(4)	691	2350	2400
RNRGLBL_U_YR5_1	NUMBER(4)	701	2350	2400
RNRGLBL_IPA_ROW1_1	NUMBER(5)	1327	21460	21170
RNRGLBL_IPA_ROW1_2	NUMBER(5)	1332	20520	20220
RNRGLBL_IPA_ROW2_1	NUMBER(5)	1352	25940	25580
RNRGLBL_IPA_ROW2_2	NUMBER(5)	1357	25000	24630
RNRGLBL_IPA_ROW2_3	NUMBER(5)	1362	24060	23680
RNRGLBL_IPA_ROW3_1	NUMBER(5)	1377	29810	29400
RNRGLBL_IPA_ROW3_2	NUMBER(5)	1382	28870	28450
RNRGLBL_IPA_ROW3_3	NUMBER(5)	1387	27930	27500
RNRGLBL_IPA_ROW3_4	NUMBER(5)	1392	26990	26550
RNRGLBL_IPA_ROW4_1	NUMBER(5)	1402	33390	32930
RNRGLBL_IPA_ROW4_2	NUMBER(5)	1407	32450	31980
RNRGLBL_IPA_ROW4_3	NUMBER(5)	1412	31510	31030
RNRGLBL_IPA_ROW4_4	NUMBER(5)	1417	30570	30080

<b>Item</b>	<b>Format</b>	<b>Pos.</b>	<b>Last Year (1011) Value</b>	<b>This Year (1112) Value</b>
RNRGLBL_IPA_ROW4_5	NUMBER(5)	1422	29630	29130
RNRGLBL_IPA_ROW5_1	NUMBER(5)	1427	36370	35870
RNRGLBL_IPA_ROW5_2	NUMBER(5)	1432	35430	34920
RNRGLBL_IPA_ROW5_3	NUMBER(5)	1437	34490	33970
RNRGLBL_IPA_ROW5_4	NUMBER(5)	1442	33550	33020
RNRGLBL_IPA_ROW5_5	NUMBER(5)	1447	32610	32070
RNRGLBL_IPA_ADDTL_1	NUMBER(4)	1452	2980	2940
RNRGLBL_IPA_ADDTL_2	NUMBER(4)	1456	0940	0950
RNRGLBL_IPA_ADDTL_3	NUMBER(4)	1460	1450	1430
RNRGLBL_IPA_ADDTL_4	NUMBER(4)	1464	2010	1980
RNRGLBL_IPA_ADDTL_5	NUMBER(4)	1472	3580	3530
RNRGLBL_BDGT1	NUMBER(5)	1477	14054	14285
RNRGLBL_BDGT2	NUMBER(5)	1482	24901	26718
RNRGLBL_BDGT3	NUMBER(5)	1487	18326	19388
RNRGLBL_BDGT4	NUMBER(5)	1492	37390	39028

# 7 EFM - Technical



Starting with the 2011-2012 aid year the FM/EFM calculation will only be available in Banner Financial Aid through the FM Need Analysis calculation developed by SunGard Higher Education. The FM/EFM calculation provided within INAS from CSS will no longer be available.

This chapter describes the technical changes needed to update the FM Need Analysis calculation to support EFM calculations for the 2011-2012 aid year and to update Banner Financial Aid to support only the SunGard FM calculations.

 **Note**

Updates for Official FM will be made in the Winter Release. ■

## Changed Tables

### Financial Aid Institution Table (ROBINST)

The comment for the following column has been updated for this release:

Column Name	Comment
ROBINST_TFC_PRO_IND	TOTAL FAMILY CONTRIBUTION PRORATION: This code indicates whether the institution wishes to use TFC proration based on the percentage of year identified by the aid period in budgeting. This indicator is no longer valid as of the 2011-2012 aid year.

## Aid Period Validation Table (RTVAPRD)

The comment for the following column has been updated for this release:

Column Name	Comment
RTVAPRD_TFC_PCT	TFC PERCENT: The total family contribution adjustment percentage to be used by this aid period code. This percentage is no longer valid as of the 2011-2012 aid year.

## New Package

---

### FM Need Calculation Support Package (rnkfm12.sql)

The new `rnkfm12.sql` package is included to support RNPFM12 processing.

## Modified Package

---

### Online FM Calculation Support Package (rpk\_fm\_calc.sql)

The `p_get_parameters` function in this package has been updated so that when building the return values for `p_parameter`, the `ROBINST_AIDY_END_YEAR` is used rather than `ROBINST_AIDY_CODE`.

# Required Data

---

## Financial Aid Institution Table (ROBINST)

The `robinstu_071802.sql` script is included to update the `ROBINST_TFC_PRO_IND` column to “N” for all aid years where the `ROBINST_AIDY_END_YEAR`  $\geq$  “2012”.

This update will ensure that an institution cannot use EFC Proration as of the 2011-2012 aid year and that the value of the column is set to “N”, even if the value of “Y” has been rolled from a prior aid year.

You must execute this script as part of the Banner Financial Aid 8.9.1 installation to ensure the correct values exist in the table prior to any processing for the 2011-2012 aid year.

## Project Specific Parameter Configuration Table (RORPARM)

### RPRPARI\_071802.SQL

The `rprparmi_071802.sql` script has been included to insert a new parameter entry to the Project Specific Parameter Configuration Table (RORPARM) table to define the web service URL for online FM calculations.

You must execute this script as part of the Banner Financial Aid 8.9.1 installation to ensure the correct values exist in the table.

- `RORPARM_ACTIVE_IND` = “Y”
- `RORPARM_USER_ID` = USER
- `RORPARM_ACTIVITY_DATE` = SYSDATE
- `RORPARM_DATA_ORIGIN` = “Banner”

<b>RORPARM_</b> <b>GROUP_</b> <b>NAME</b>	<b>RORPARM_</b> <b>PARAMETER</b>	<b>RORPARM_DATA</b>	<b>RORPARM_DESCRIPTION</b>
FMCAL	WS_ENDPOINT_ONLINE	<a href="https://fm1.sungardhe.com/EFCSservice/EFCCalculationService.asmx">https://fm1.sungardhe.com/EFCSservice/EFCCalculationService.asmx</a>	FM Calculation Web Service URL for online calculations.

## **rormapmu\_071802.sql**

The `rormapmu_071802.sql` script has been included to update the entries as specified below in the Project Specific Parameter Configuration Table (RORPARAM).

You must execute this script as part of the Banner Financial Aid 8.9.1 installation to ensure the correct values exist in the table.

<b>RORPARAM_ GROUP_ NAME</b>	<b>RORPARAM_PARAMETER</b>	<b>RORPARAM_DESCRIPTION</b>
FMCAL	BATCH_SIZE	Maximum batch size used in the RNPFMxx process.
FMCAL	DEBUG	Default is Y. Set to N if you do not want the online FM Calculation to run with verbose debug messages. The default value is Y.
FMCAL	THREAD_SIZE	Maximum concurrent threads used in the RNPFMxx process.
FMCAL	USE_JOB SUB	Default is N. Set to Y if you want the online FM Calculation to run through the Job Submission server rather than through the web servlet.
FMCAL	XML_DUMP	Default is N. Set to Y if you want to write the XML data to the log file when running RNPFMxx in batch.

# 8 Problem Resolutions



This section lists the problem resolutions included in the Banner Financial Aid 8.9.1 release. At the time this guide was completed, the following problem resolutions were targeted for delivery with this release.

 **Note**

For comprehensive and detailed problem, impact, and resolution information for all defects corrected in this release, refer to the supplemental problem resolutions file (`finaid80901resolutions.txt`) delivered along with your release guide. The information in this text file is extracted directly from the Customer Support Center just prior to release of the product and may include additional defects that were resolved after this document was finalized. ■

Object Name	Defect #	Summary
BANNER FINANCIAL AID NEW AID YEAR CHECKLIST	1-B8F5U8	The Banner Financial Aid New Aid Year Checklist 8.6 incorrectly lists two forms to review
Release Guide	1-DZCAQ0	8.8.1/7.18.1 Release Guides
RNAPRxx	1-DZP3XI	When performing a Simulation (SIM) on RNAPRxx the RCRAPP1_ACTIVITY_DATE is updated for all records.



# A Additional Technical Details



This release, along with its description of Banner Financial Aid Need Analysis and the Off-Premise (SaaS) FM Calculation, includes behind the scenes technical enhancements. This appendix describes additional technical information for the following topics:

- Software Installation and Configuration
- New Proxy Settings
- On-Premise Reinstall of FM Calculations

## Note

The installation and configuration steps that follow require that you have successfully installed Banner Financial Aid Release 8.9. ■

## Software Installation and Configuration

### Updating security nas.properties file of rnpfm12.jar

The nas.properties file is embedded with the process rnpfm12.jar.

#### Updating rnpfm12.jar

1. The batch process requires a user name and password to connect to the FM Calculation Web Service, EFCService. The following steps outline the process of updating rnpfm12.jar with the institution unique authentication.
2. To extract the nas.properties file from rnpfm12.jar, use the following command:  

```
jar xf rnpfm12.jar nas.properties
```
3. Open the nas.properties file in a text editor.
4. Change the user name and password values, the text to the right of the equal sign, for these properties
  - httpusername=
  - httppassword=

 **Note**

For Off-Premise applications, use the authentication code provided when the institution applied for the Off-Premise status. For On-Premise applications, use the authentication setup during the install of the Windows IIS, if basic authentication was configured (otherwise, make no changes). ■

5. Update the `rnpfm12.jar` with the edited `nas.properties` file with the following command:

```
jar uf rnpfm12.jar nas.properties
```

## Updating security `nas.properties` file of `rnpfmxx.war`

1. For the servlet, both the user name/password and the security seed numbers must be updated.
2. The war archive file `rnpfmxx.war` default seed numbers must be updated with the institution seed numbers.

 **Note**

Two security seed numbers are required for Oracle forms, COBOL and Java processes to be allowed to connect to the Oracle database. ■

3. Login into the environment where Banner Financial Aid is installed. Navigate to `<BANNER_HOME>/finaid/java/`.
4. To extract the `nas.properties` file from `rnpfmxx.war` use the following command:

```
jar xf rnpfmxx.war WEB-INF/nas.properties
```

5. Open the `WEB-INF/nas.properties` file in a text editor.
6. Change the user name and password values, the text to the right of the equal sign, for these properties
  - `httpusername=`
  - `httppassword=`

 **Note**

For Off-Premise applications, use the authentication code provided when the institution applied for the Off-Premise status. For On-Premise applications, use the authentication setup during the install of the Windows IIS, if basic authentication was configured (otherwise, make no changes). ■

- Using the institution security seed number, change the values, the text to the right of the equal sign, for these properties

- seed1=
- seed3=

- Update the `rnpfmxx.war` with the edited `nas.properties` file with the following command:

```
jar uf rnpfmxx.war WEB-INF/nas.properties
```

- Cleanup by deleting the following temporary file and directory:

- `nas.properties`
- `WEB-INF` directory and its content.

## Deploying `rnpfmxx.war`

- The following two files must be copied to a location where web browser access is possible:
  - `.../finaid/java/rnpfmxx.war` (archive)
  - `rnpfmxx_plan.dat` (deployment plan)
- From a Web Browser, login into the Oracle Enterprise Manager.
- Navigate to the **Applications** tab and click the **Deploy** button.



The screenshot shows the Oracle Enterprise Manager interface for the Applications tab. At the top, there are buttons for Start, Stop, Restart, Undeploy, Redeploy, and Deploy. Below these are links for Select All, Select None, Expand All, and Collapse All. The main area contains a table with the following columns: Select, Name, Status, Start Time, Active Requests, and Request Pr. The table lists three applications: ascontrol, default, and rnpfmxx. The rnpfmxx application is selected with a checkmark.

Select	Name	Status	Start Time	Active Requests	Request Pr
<input type="checkbox"/>	ascontrol	↑	Oct 18, 2010 12:34:19 PM GMT	1	
<input type="checkbox"/>	default	↑	Oct 18, 2010 12:34:19 PM GMT	0	
<input checked="" type="checkbox"/>	rnpfmxx	↑	Oct 20, 2010 6:10:18 PM GMT	0	

- Click the **Choose File** button and navigate to the `rnpfmxx.war` archive file and click **Open**.

- From the **Redeploy: Select Archive and deployment plan** screen, click the **Next** button to continue to the **Deploy: Application Attributes** screen.

#### Redeploy: Select Archive and deployment plan

You have chosen to redeploy application "mpfmx". The running application will be stopped during redeployment. Select the archive and deployment plan to continue, or click "Cancel" to cancel this operation.

##### Archive

Use this section of the page to specify the archive file that you want to redeploy.

- Archive is present on local host. Upload the archive to the server where Application Server Control is running.

Archive Location  mpfmx.war

- Archive is already present on the server where Application Server Control is running.

Location on Server

The location on server must be the absolute path or the relative path from j2ee/home

- From the **Deploy: Application Attributes** screen (2 of 3), wait for the selected files to be uploaded and click the **Next** button to continue to the **Deploy: Deployment Settings** screen (3 of 3).

**Deploy: Application Attributes**

Cancel Back Step 2 of 3 **Next**

Archive Type **Web Module (WAR file)**  
 Archive Location **mpfmx.war**  
 Deployment Plan **mpfmx\_plan.dat**

\* Application Name   
 Parent Application   
 Bind Web Module to Site   
 Context Root

Web Module	Context Root
mpfmx	mpfmx

Cancel Back Step 2 of 3 **Next**

- From the **Deploy: Deployment Settings** screen (3 of 3), click the **Deploy** button to acknowledge your recently configured settings.

**Deploy: Deployment Settings**

Cancel Back Step 3 of 3 **Deploy**

Archive Type **Web Module (WAR file)**  
 Archive Location **mpfmx.war**  
 Deployment Plan **mpfmx\_plan.dat**

Application Name **mpfmx**  
 Parent Application **default**  
 Bind Web Module to Site **default-web-site**  
 Context Root **mpfmx**

**Deployment Tasks**

The table below provides a set of common deployment tasks you might want to perform for this application. Only those tasks that apply to the current application are enabled.

Task Name	Go To Task	Description
Map Environment References		Map any environment references in your application (for example, data sources) to physical entities currently present on the operational environment.
Select Security Provider		A security provider acts as the source for available users and groups when mapping security roles.
Map Security Roles		Map any security roles exposed by your application to existing users and groups. The list of users and groups is obtained from the security provider you selected for this application.
Configure EJBs		Configure the Enterprise JavaBeans in your application.
Configure Clustering		Configure clustering of your application.
Configure Class Loading		Manipulate the classpath of your application.

**Advanced Deployment Plan Editing**

Click Edit Deployment Plan to set more advanced deployment options.

**Save Deployment Plan**

After you make changes, you can save the deployment plan to your local disk. You can then use the saved deployment plan to redeploy this application later.

Cancel Back Step 3 of 3 **Deploy**

8. A confirmation page will be displayed to indicate successful deployment. From the Confirmation page, click the **Return** button to accept the configuration.

Confirmation

The Application "rnpfmxx" has been successfully deployed.

Progress Messages

```
[Aug 30, 2010 10:19:22 AM] Application Deployer for rnpfmxx STARTS.
[Aug 30, 2010 10:19:22 AM] Copy the archive to C:\oc4\j2ee\home\applications\rnpfmxx.ear
[Aug 30, 2010 10:19:22 AM] Initialize C:\oc4\j2ee\home\applications\rnpfmxx.ear begins...
[Aug 30, 2010 10:19:22 AM] Unpacking rnpfmxx.ear
[Aug 30, 2010 10:19:23 AM] Done unpacking rnpfmxx.ear
[Aug 30, 2010 10:19:23 AM] Unpacking rnpfmxx.war
[Aug 30, 2010 10:19:28 AM] Done unpacking rnpfmxx.war
[Aug 30, 2010 10:19:28 AM] Initialize C:\oc4\j2ee\home\applications\rnpfmxx.ear ends...
[Aug 30, 2010 10:19:28 AM] Starting application : rnpfmxx
[Aug 30, 2010 10:19:28 AM] Initializing ClassLoader(s)
[Aug 30, 2010 10:19:28 AM] Initializing EJB container
[Aug 30, 2010 10:19:28 AM] Loading connector(s)
[Aug 30, 2010 10:19:28 AM] Starting up resource adapters
[Aug 30, 2010 10:19:28 AM] Initializing EJB sessions
[Aug 30, 2010 10:19:28 AM] Committing ClassLoader(s)
[Aug 30, 2010 10:19:28 AM] Initialize rnpfmxx begins...
[Aug 30, 2010 10:19:28 AM] Initialize rnpfmxx ends...
[Aug 30, 2010 10:19:28 AM] Started application : rnpfmxx
[Aug 30, 2010 10:19:29 AM] Binding web application(s) to site default-web-site begins...
[Aug 30, 2010 10:19:29 AM] Binding rnpfmxx web-module for application rnpfmxx to site default-web-site under context root rnpfmxx
[Aug 30, 2010 10:19:31 AM] Binding web application(s) to site default-web-site ends...
[Aug 30, 2010 10:19:31 AM] Application Deployer for rnpfmxx COMPLETES. Operation time: 8923 msec
```

Return

## Online FM Calculations using job submission

If the institution chose NOT to install the servlet `rnpfmxx.war`, update INB to use job submission to process online (Off-Premise) FM Calculations.

1. Login into INB and navigate to the Project Based Parameter Setup Form (RORPARAM).
2. For parameter `USE_JOB SUB`, change the default value from "N" to "Y".

## New Proxy Settings

### Proxy settings for process `rnpfm12.jar`

Process `rnpfm12` comes with two properties, "`http.proxyHost`" and "`http.proxyPort`", that can be added to allow the process to navigate through a proxy to connect to the Web Service.

1. To modify these properties, open the appropriate script for the environment in a text editor.
  - For UNIX based system use script `rnpfm11.sh`.
  - For VMS based system use script `rnpfm11.com`.
  - For Windows based system use script `rnpfm11.pl`.

2. Make the changes by adding the properties and replacing the default values with the appropriate values for your institution.

Above the existing properties "-Ddatabase=", the following properties need to be added:

- -Dhttp.proxyHost=my\_host
- -Dhttp.proxyPort=my\_port

## Proxy settings for servlet rnpfmxx.war

To change the servlet `rnpfmxx.war` to use a proxy server to access the internet, changes must be made to the startup configuration of the OC4J.

1. Open this file `<INSTALL>/opmn/conf/opmn.xml` in a text editor.
2. Locate the following text:

```
<ias-component id="default_group">
  <process-type id="home" module-id="OC4J" status="enabled">
    <module-data>
      <category id="start-parameters">
        <data id="java-options" value="-Doc4j.formauth.redirect=true
          -Dhttp.session.debug=true"/>
      </category>
      ...
    </module-data>
  </process-type>
</ias-component>
```

3. In the `<data id="java-options">` section, add the following two properties:

- -Dhttp.proxyHost=my\_host
- -Dhttp.proxyPort=my\_port

- 3.1. Each of the properties should be separated by a white space. This can be either a space or a linefeed.

**3.2.** For example:

```
<data id="java-options" value="-Doc4j.formauth.redirect=true  
-Dhttp.session.debug=true -Dhttp.proxyHost=my_host -  
Dhttp.proxyPort=my_port"/>
```

OR

```
<data id="java-options" value="-Doc4j.formauth.redirect=true  
-Dhttp.session.debug=true  
-Dhttp.proxyHost=my_host  
-Dhttp.proxyPort=my_port"/
```

**3.3.** Replace the values `my_host` and `my_port` with values that are appropriate for your institutions.

 **Note**

This guide assumes that the proxy properties are global, for all of the applications on this OC4J. If the proxy properties are limited to just the `rnpfmx.war` servlet, then:

The servlet `rnpfmx.war` must be installed in its own application container.

In step 2 above, look for `<ias-component id="your_install">` that matched with the application name. ■

# On-Premise Reinstall of FM Calculations

---

1. Download and unzip the latest version of the EFCSERVICE.

- The file includes the following:

```
..\EFCSERVICE\App_Data\Config.xml  
  
    \bin\EFC.dll  
        \EFCSoapExtension.dll  
        \ExceptionHandler.dll  
        \FederalEFC.dll  
        \FederalEFC1011.dll  
        \FederalEFC1112.dll  
        \FinancialAidService.dll  
  
    \efc_calculation_messages.xsd  
    \EFCCalculationService.asmx  
  
    \Web.config
```

2. On IIS, stop the web site.
3. Navigate to the EFCSERVICE folder.
4. Copy the contents of the new EFCSERVICE to this folder, overwriting the content.
5. Start the web site.

 **Note**

The new configuration files `Config.xml` and `Web.config` have been modified to use relative paths. No changes are needed to be made to the files.